



Winchester Old Town Development Board Retreat

Thursday, November 5, 2015

10 AM – 3:30 PM

George Washington Hotel, Garden Room

Attendees

Winchester Old Town Development Board (OTDB): Jennifer Bell (Downtown Manager), Scott Dawson (Chairman), Mark Lore (Promotions Chairman), Cory Garman (Vice-Chairman), Sarah Chapman, Scott Spriggs, Susan Drew, Steve Maclin, David Cavallaro, Christine Germeyer, Andrea (last name not documented)
Virginia Main Street (VMS) Staff: Kyle Meyer

Purpose

The OTDB board of directors gathered together on a Thursday morning to work plan priority projects for 2016 and into the next few years. Kyle Meyer, Community Development Administrator for the VMS Program facilitated the meeting by leading discussion and activities to build consensus among the board and volunteers. This document records the outcome of the retreat and provides organizational focus and a general work plan for the board to develop further.

As a reminder, why is it important to have a work plan?

1. Helps define your organization
2. Gives you direction and tools to measure your success
3. Clarifies roles
4. Provides a financial road map and helps allocate scarce resources – both time and money
5. Gives credibility and focus to funders and volunteers
6. Helps define what you are **NOT** going to do
7. *It's a great team-building exercise that develops ownership*

Agenda

10 AM	Welcome, Introductions and Overview
10:30	Main Street Approach Overview
11	Embrace the Vision and Mission
12	Lunch Break
12:30	Project Brainstorm
1:30	Moving Forward w/ Special Event RFP Recommendations (60 minutes)
2:30	Formal Board Meeting
3:30	Adjourn

Welcome

For an introduction, each attendee stated their name and imagined a mascot that represented downtown Winchester. They were instructed that a mascot is a person or thing that is supposed to bring good luck or is used to symbolize a particular event or organization; in this case they were to imagine something that would bring good luck and symbolize the Winchester downtown district. This creative discussion scratched the surface of the board's awareness of the downtown's brand, cultural history, market and primary products.

- ☐ Scott Dawson – "David", George Washington

- ☐ Scott Spriggs - “Josh”, an ambassador to the district, a local young, musician who carries his guitar downtown, sits in cafes and is always smiling, enjoying himself.
- ☐ David Cavallaro – “David”
- ☐ Sarah Chapman – a dancing apple, to celebrate the local agricultural heritage
- ☐ Cory Garman – Patsy Cline, cultural, country icon
- ☐ Steve Maclin – “Josh”
- ☐ Mark Lore – Historic core around the Taylor Hotel, a revitalized, historic heart of downtown
- ☐ Susan Drew – Ghost of history
- ☐ Christine – “Josh”

What is Virginia Main Street? - Brief

The National Main Street Center’s (NMSC) Main Street Approach™ provides a proven framework to spark a renewal of downtown commerce as well as improve the way a district looks. Each of the Main Street Four Points uses strategies to increase commercial activity, preserve unique and historic assets and enhance the attractiveness of real estate. The comprehensive approach is based on the fundamentals of real estate economics and it gives communities an effective kit of tools to address the complex and changing issues that face the downtown business environment.

The Main Street Approach™ requires focus on economic impact in communities, creating potential significant positive change on Main Street by stressing broad community engagement to secure support for a Main Street vision and monitoring tangible, quantifiable outcomes to better tell the local story to funders and key stakeholders. The Main Street Approach consists of three tightly-integrated components:

1. Identifying Community Vision (Inputs)
 - a. Community Vision: What do people want?
 - b. Market Research: What can the market support?
2. Developing and Implementing Transformation Strategies
 - a. Guide the direction of the revitalization initiative
 - b. Bring about substantive transformation
 - c. Reflective of community vision
 - d. Based on a solid understanding of the district’s economic opportunities
 - e. Implemented through the Four Point framework
 - f. Measureable
 - g. Re-evaluated every 2-5 years
3. Measuring Impacts (Outputs)
 - a. Quantitative Outcomes
 - b. Qualitative Outcomes

The Four Points - Communities tailor their own individual strategies, working in each of the four interconnected areas.

- ☐ **Organization** - Establishing consensus and cooperation by building effective partnerships among all downtown stakeholders
- ☐ **Economic Vitality** - Strengthening downtown’s existing economic assets and fulfilling its broadest market potential
- ☐ **Design** - Enhancing the unique visual quality of downtown by addressing all design elements to create an appealing environment
- ☐ **Promotion** - Creating and marketing a positive image based on the unique attributes of the downtown district

Guiding Principles - Downtown revitalization efforts using the Main Street Approach™ incorporate eight guiding principles.

1. Comprehensive
2. Incremental
3. Public-private partnerships
4. Built on existing assets
5. Action-oriented
6. Attitude change
7. Quality
8. Self-help

National Main Street Communities Criteria for Recognition – The Main Street program accreditation process evaluates local Main Street programs according to 10 performance standards and provides national recognition to those that meet these standards. The national accreditation program strives to:

- ☐ Provide local and national visibility to local Main Street programs that understand and fully utilize the Main Street Four-Point Approach® and eight Main Street principles and that continue to evolve organizationally to meet new challenges;
- ☐ Provide national standards for performance for local Main Street programs; and
- ☐ Provide realistic goals and a tangible incentive for local Main Street programs that do not yet meet the criteria for national recognition.

Receiving National Main Street Program status is a prestigious designation. While every designated local Main Street program can work toward accreditation, not every Main Street program receives it. Main Street coordinating programs, like VMS, evaluate their local programs every year and submit their eligible programs to the National Main Street Center.

The 10 criteria for recognition as a National Main Street Community are as follows:

1. Broad-based community support for the commercial district revitalization process, with strong support from both the public and private sectors
2. Vision and mission statements relevant to community conditions and to the local Main Street program's organizational stage
3. Comprehensive Main Street work plan
4. Historic preservation ethic
5. Active board of directors and committees
6. Adequate operating budget
7. Paid, professional program manager
8. Program of ongoing training for staff and volunteers
9. Reporting of key statistics
10. Current member of the National Main Street Network

Embrace the Vision and Market

S.W.O.T Analysis Activity – The goal of this activity was to identify key downtown issues that would guide project planning later in the retreat. A simple worksheet assisted participants to consider the *strengths* and *weaknesses* within the OTDB, as well as the *opportunities* and *threats* within the downtown and surrounding region that could foster or impede revitalization progress. Each member identified the most important strategic priorities to guide projects, or better said transformation strategies, by placing a dot next to the issue, a voting/democratic process. The number of dots each issue received is noted.

Key organizational and downtown issues:

Strengths (Internal/OTDB)

- ☐ **Growing, strong board/passionate about district improvement (5 dots)**
- ☐ Strong foundation, string of successes, legacy
- ☐ Financial stability – special tax district
- ☐ City support and effective
- ☐ Adhoc committee effective, project specific
- ☐ Diverse representation

Weaknesses (Internal/OTDB)

- ☐ **Community participation (6 dots)**
 - **Communication with community, with stakeholders**
- ☐ **Board participation with committees/event participation (3 dots)**
- ☐ **Regular committees, difficulty with follow-through (3 dots)**
- ☐ Use of VMS Grants – Downtown Improvement Grant (DIG) and Financial Feasibility Grant (FFG) (2 dots)
- ☐ Could be more diverse
- ☐ More face to face interaction with stakeholders

Opportunities (External/District)

- ☐ **Brand reinforcement (6 dots)**
 - Cohesive marketing/consistent, working with partners
- ☐ **Attention to Secondary District (5 dots)***
- ☐ Regional destination, increase tourism
- ☐ Community buy-in to downtown, activities/excitement
- ☐ Leverage working together w/ related downtown groups

Threats (External/District)

- ☐ **Micro versus macro thinking, understanding the big picture (6 dots)**
- ☐ **Lack of anchor stores, stores with customers all day (3 dots)**
- ☐ **Secondary district left out (2 dots)***
- ☐ Temptation to do the same things, events – missing demographic groups (1 dot)
- ☐ Business turnover, help businesses survive, are they the right business for downtown
- ☐ Perceived risk of doing business downtown, lack of customers, market

Old Town Development Board's Transformation Strategies to guide Main Street Approach strategies and projects – Gleaned from the S.W.O.T. analysis, the board developed a list of overarching goals to guide committee projects and coordinate activities. From this list the board voted by hand for the top five. Each of the Four Point committees will develop projects that support these five overarching goals. The first three are recommended priority transformation strategies, as they have the most potential to create significant positive change on the district by stressing broad community engagement and monitoring tangible, quantifiable outcomes.

- 1. Reinforce brand and build awareness**
- 2. Increase community participation**
- 3. Direct resources at Secondary District for substantive transformation and connection to Primary District**
4. Continue to grow a stronger board and committees
5. Encourage “big picture” thinking about the district, macro vs. micro

Project Brainstorm

As work planning participants, the participants were asked to take ten minutes to record (on their own) specific, measurable projects that their Main Street program should work on in the coming year to three years to support the transformation strategies. The ideas were recorded on note cards and then posted on the wall to be processed, organized and developed further. In a democratic process, each member prioritized projects by using the colored dot stickers, green = now, yellow = soon, red = later. The proposed projects are in order of most votes and priority projects bolded in black.

Economic Vitality

1. **Greatness Program 2.0 (6 green/now dots) – Steve and David**
 - a. Cooperative focus
 - i. Beer Trail
 - ii. Dining Trail
 - iii. Stay-cation packages
 - iv. Shop/dine/stay
 - v. “What can I do to help my fellow stakeholder”
2. **Profile businesses and owners (6 yellow/soon dots)**
3. **Grant opportunities (6 total dots - 3 yellow/soon & 3 red/laters)**
4. **Tax Break to businesses, incentivize, that hires creative class, \$45K up (4 total dots, 1 green/now & 3 red/later)**

Organization - Mark

1. **Create stronger relationship with City Council through joint Happy Hours (6 total dots, 5 green/now, 1 yellow/soon)**
2. **Amp up stakeholders meetings to generate greater participation, + OTWBA (6 total dots, 5 green/now & 1 red/later)**
 - a. Partnership building with stakeholders and community members
 - b. Relationship building...How do you want to interact...face to face, social media, phone calls, letters, all the above
 - c. Strategic five-year plan for OTDB, OTWBA, Main Street Foundation
3. **Recruiting S.U. students to volunteer, serve on committees, etc. (5 yellow/late dots)**
4. **Get with new Tourism Director to partner on growing downtown (4 total dots, 3 green/now & 1 red/late) – Steve and David**
5. **Increase visibility/role of DT Welcome Center – Brand reinforcement (3 total dots, 2 green/now & 1 yellow/soon)**
 - a. Welcome to Winchester – thumbdrive of resources for branding; include contacts..avenue for communication...how to find you
 - b. Inventory of opportunities – event participation, real estate availability, investment opportunity, residential availability, participation opportunities
6. **Reach out to specific civic groups, churches, etc. to solicit volunteers, to promote events (3 total dots, 2 yellow/soon & 1 red/late)**
7. **Actively recruit board members – Susan**
 - a. Cultivate future OTDB members through committees
 - b. Create clever process to recruit board members

Promotion – Andrea and Steve

1. **Examine ways in which visitor attention can be diverted to secondary district (6 total dots, 1 green/now, 3 yellow/soon & 2 red/late)**
 - a. Marketing/promotions tailored specifically to Secondary District
2. **Happy Hour each month to engage local marketing community (5 total dots, 2 green/now & 3 yellow/soon)**

- a. Expand the volunteer network to include professional skill sets
- 3. **Improve collection of survey data (5 total dots, 2 green/now, 2 yellow/soon & 1 red/late)**
 - a. Create #
 - b. Create an analysis dashboard, ex. food tax, website, social media, etc.
- 4. Free Old Town promotional gifts at events and during peak season, T-shirt Day, etc. (4 total dots, 3 green/now & 1 red/late)
- 5. Refine and improve public events & programming
 - a. Diversity of events, art focused, education-based, health, cultural, and agricultural (4 yellow/soon dots)
 - b. Event planning and implementation participation
- 6. PR campaign and promote brand as part of a broader marketing calendar (3 green/now dots) – Scott S.

Design – Susan and Mark

- 1. **Update and improve wayfinding signage to represent current brand (7 green/now dots) – Scott S.**
- 2. **Historical Markers telling history of each building, tell the tale, sense of place (7 total dots, 5 yellow/soon & 2 red/late)**
- 3. **Murals on buildings or parking garages (6 total dots, 5 green/now & 1 yellow/soon) - Andrea**
 - a. Public Art focus, broadly
- 4. Façade renovation push (1 yellow/soon dot)

Next Steps

In order to ensure a successful start and completion of these projects, it is pertinent to answer the following questions:

- 1. Can it be completed in ____ months?
- 2. Is it within the goals of the mission/vision statements?
- 3. Is it important?
- 4. Will it have measurable results and what are they?

The group must start with the highest priority and determine how many of the projects can realistically be done in the coming year or two. Then, a “project sheet” will need to be completed for each project that made the final cut (see National Trust Main Street Center *Complete Work Plan* document). Set a goal to complete all projects sheets at upcoming committee meetings. It is encouraged to space these projects throughout the year to avoid member burnout.

Each project will have:

- 1. An objective
- 2. Expected results for the project
- 3. Specific tasks to complete the project
- 4. A start date for each task
- 5. An end date for each task
- 6. Responsible individual/party
- 7. A budget for each task

Conclusion

- ☐ Set a deadline for the completion of the work plan
- ☐ After completion of work plan, Chairman or designated individual will “package” a draft to be presented to the board for their approval.

- ❑ The board and executive director will need to look for duplication between committees, and possibly call a meeting to review all four committee work plans before final approval to discuss ways committees can work together to get additional feedback from more stakeholders.
- ❑ Use the work plan tool; make sure you bring final approved copies to all future committee and board meetings; and when setting future meeting agendas be sure to list time to discuss work plan progress. This will help your committee stay on track and meet deadlines.

Resources

- ❑ Main Street Refresh FAQ
- ❑ Vision and Mission Development Worksheet
- ❑ Market Position Statement Worksheet
- ❑ Transformation strategy work plan template
- ❑ Board Responsibilities One-pager

For more information, resources, and organizational development contact:

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- 10 AM Welcome, Introductions and Overview of the Day (30 minutes)**
- ☐ Welcome
 - ☐ Agenda Review
 - ☐ Participant Introductions
- 10:30 What is Main Street? (30 minutes)**
- ☐ A quick review of the basics
 - ☐ Review OTDB vision, branding, and market position
- 11:00 Embrace the Vision and Market (60 minutes)**
- ☐ S.W.O.T. analysis activity (Internal/Organizational – Strengths and Weaknesses and External/Downtown – Opportunities and Threats)
 - ☐ Share ideas – each pair read one of their ideas to the group and the facilitator will record on the flip charts.
 - ☐ Identify 3-5 Transformation Strategies (overarching goals) to guide projects
 - Each member identifies the top 3-5 strategic priorities the organization should work on over the coming 2-5 years by placing 1 dot by each.
- 12 PM Lunch Break**
- 12:30 Project Brainstorm (60 minutes)**
- ☐ Take 10 minutes to record (on your own) specific, measurable projects that OTDB should work on in the coming 2-5 years.
 - Identify current projects that are supporting the vision and future projects gleaned from recent trainings and consultant visits
 - ☐ Share ideas – each member read one of their ideas to the group and place under one of the appropriate Main Street Four Points
 - ☐ Prioritize projects - each member prioritizes the lists by choosing long- and short-term projects each committee should work on in the coming year.
 - Prioritize projects by using colored dot stickers, green = now, yellow = soon, red = later
 - ☐ Project accountability – Formalizing the work plan
 - Discuss timelines and encourage members to space committee projects throughout the year to avoid volunteer burnout
 - Volunteer or be drafted to chair project committees
- 1:30 Moving Forward w/ Special Event RFP Recommendations (60 minutes)**
- 2:30 Formal Board Meeting**
- 3:30 Adjourn**

OTDB Vision Statement:

To be a vibrant and inclusive Main Street community that combines small-town charm and big-city opportunity and is nationally recognized as a desirable place to work, live, and thrive.

OTDB Mission Statement:

The OTDB inspires community involvement, fosters economic vitality, encourages creativity and entrepreneurship, and attracts residents, visitors, and investors to Old Town Winchester.

Old Town Winchester's Branding Narrative:

We are Old Town Winchester, the historic core of our amazing vibrant community, with over 30 places to eat and 50 places to shop and numerous museums and historic sites to visit. Once considered the edge of the Great Frontier, our nature is our stage, and the fruits of this land have long been the fuel of our industry and the inspiration of our celebrations. We've nurtured great heroes and great businesses. We are proud to be the first place to elect George Washington into office, we inspired Rear Admiral Byrd to explore the globe, and we remember with respect the role our land and our sons and daughters played in the Civil War. We've preserved our great history. Our stories ring true in the architecture that surrounds us, and each building has a story to tell, from Patsy Cline's home to the grand Handley Library, the Old Civil War Courthouse to the Taylor Hotel a centerpiece of Old Town. Our history continues to surprise. Great things are happening every day in Old Town. Whether it is our unique dining and shopping or our lively events, Old Town Winchester provides the perfect escape. We are Old Town Winchester. We invite you to explore our core, discover all the charm of a small town, and be comforted by the offerings of a place much larger. Get lost in our stories, and begin to craft your own, and you'll see why we say: Old Town Winchester- **Greatness Begins Here.**